

# OIM Highlights: May 20, 2009

Key UW Strategic Roadmap initiatives underway in the Office of Information Management in partnership with schools, colleges, and central business units.

<http://www.washington.edu/provost/oim/>

## Prioritize and Make Decisions

- **Budget reductions impact OIM; stop or delay projects and efficiencies:** OIM's budget was reduced by 17.5% (with midyear reductions), and 20 positions were lost. Key impacts include delayed build out of the data warehouse, significantly slowed progress on enterprise reporting/workflow and business Web services, reduced ability to build a cooperative information management community to leverage common solutions, and reduced capacity to undertake work that creates efficiencies for the UW community. Top-priority work continues on both the Financial Systems Needs Assessment and the Kuali Student collaboration.
- **Key work on UW IT governance moves forward with two new groups:**
  - An Interim University Technology Advisory Committee (Interim U-TAC) formed to enable UW to address important IT policies and priorities and consolidate the responsibilities of the three technology advisory committees. See [Interim U-TAC](#) charge, membership, and meeting minutes.
  - A Governance Action Team (GAT) is in place to recommend a UW-wide IT governance structure and plans to complete its work by this summer. The GAT is one of 11 action teams formed to implement the recommendations of the UW Technology Working Group. See [GAT](#) charge and membership.

## Information for Decision Making

- **Top 5 initiative delivers reports; widens scope to enterprise reporting:** The Top 5 project is moving to an ongoing program focus and working on a structure to meet UW reporting needs. Read the attached [final progress report](#) to learn about a new advisory committee, broader scope, and name change to "Enterprise Reporting." For enterprise reports and a delivery schedule, see the [DMC Web page Spotlight](#).

- **The University Student Database (UWSDB) is now securely and widely available.** UWSDB is now available from the Enterprise Data Warehouse for reporting and analysis. Accessible with a UW NetID, the data can be used for quick report development and distribution using central tools—saving units cost and time on ad-hoc reporting. In the new environment, administrators can monitor the use and performance of student reports and find information that will reduce their work reconciling data.
- **A new blog for resource oriented architecture keeps developers informed:** "[OnTheROA](#)" engages UW Web developers interested in resource oriented architecture (ROA) progress. ROA is an important new paradigm for delivering services since it enables UW developers to create public-facing Web pages and applications that provide access to formerly unavailable data. (See a related story on [photo class lists](#).)

## Replace the Base

- **Kuali Student continues:** OIM has a new program manager to oversee the entire student program. This new approach will allow tighter integration of the entire program, from new development to ongoing maintenance, including UW's involvement in Kuali Student. See the new [Kuali Student Web site](#) for details on UW participation in the development of a next-generation student system.
- **Financial System Needs Assessment (FSNA) project on track:** The FSNA project conducted focus groups on the UW's current chart of accounts (COA) involving 140 people and found that COA significantly limits reporting capabilities, and its structural limitations contribute to inefficient business processes. Full findings and next steps will be [published online](#) this spring. Ongoing work to gather and validate business requirements for the new financial system will include documenting high-level UW financial processes, piloting a work group to review,

modify, and define business requirements for fixed assets, and holding nine work group sessions for various functional areas (purchasing, accounts payable, accounts receivable, etc.).

## Enhance and Renew Systems

- **eFECs brings big efficiency improvements:** The Electronic Faculty Effort and Cost Sharing project launched its initial module in February, providing quick access to cost share information, better analytical tools, and improved compliance data to UW staff that deal with cost share information—saving time and providing better information.
  - **Photo class lists now available on MyUW:** Instructors now can learn the names of their students before class by looking at student lists—including photos. This feature, sponsored by the Office of the Registrar, was developed quickly thanks to new technology advances in Web Services that foster innovation, allowing developers from the UW community to create public-facing Web pages and applications that combine data from different sources. See an [article in The UW Daily](#).
  - **Administrators can now see student academic records on the Web:** The Web-based Electronic Academic Records System, long used by academic advisers, is now enhanced and available to administrative staff.
- ## Redesign Processes
- **Web Grade Submission launch exceeds usage expectations:** A new service allowing instructors to submit grades online handled 52,375 grades in Winter Quarter—almost as many as were submitted via paper forms. The collaborative team—involving Catalyst, Computer Science & Engineering, the Office of the Registrar, OIM, and UW Technology—expects to see increased Web grade submissions in the future. See an [article in University Week](#).

## TOP 5 PROGRESS

### What Is the Top 5 Project?

The Top 5 project was initiated to answer the top five most critical data questions identified by deans and chancellors, including:

- **Student data:**
  - What is my student headcount by major?
  - What are my student credit hours?
- **Faculty data:**
  - What is my faculty headcount by appointment type?
  - What is my faculty FTE by appointment type?
- **Financial data:**
  - What are the financial resources for my school, college, or campus for a given fiscal period and by funding source?

### What Has It Achieved So Far?

The Top 5 project has:

- ✓ **Developed reports that answer most of the Top 5 questions.**
  - Eleven reports have been created – 7 answer the student data questions, 1 answers the faculty data questions, and 3 answer the financial data questions.
  - See the reports at:  
[www.washington.edu/provost/oim/dmc/reports.html](http://www.washington.edu/provost/oim/dmc/reports.html)
- ✓ **Created institutional definitions for key data needed to answer the questions.**
  - Secured agreement on 38 official institutional definitions needed to produce the first 11 reports.
  - This was the first effort of its kind to engage key stakeholders in establishing mutually agreed upon institutional definitions.
- ✓ **Established a repeatable process for developing future institutional data definitions and reports that answer key data questions more efficiently.**
  - This marks a major step forward in the UW's ability to provide access to accurate, useful

information. Until now, individual units each had their own definitions for basic data.

- Lack of agreed upon institutional definitions made it difficult to produce accurate data or make meaningful cross-unit comparisons. The new process will make it faster and more efficient to identify future institutional data definitions and develop reports that answer key data questions.
- The project will now publish one remaining report and communicate about the new reports and how to access them.

**More information.** For a detailed summary of progress on issues, definitions, and reports relating to each Top 5 question, see:

[www.washington.edu/provost/oim/dmc/docs/T5SRMatrix.pdf](http://www.washington.edu/provost/oim/dmc/docs/T5SRMatrix.pdf)

### What Are the Next Steps?

The next steps for the project are to:

- **Broaden the scope** of the Top 5 project to include research data, planning and budgeting's Unit Resource Profile (URP) report, and others.
- **Change the name of the project to "Enterprise Reporting"** to reflect this broader **scope**. (More information below.)
- **Engage an Academic Advisory Committee to provide direction to future efforts.** (More information below.)
- **Establish additional institutional definitions and deliver new reports answering the next set of top-priority data questions.** New reports to be available by June 30 include:
  - Nine financial management reports that answer questions about grant and contract cost accounting, salary allocations, and budgets
  - Three student reports that answer questions about graduation and admission
- **Continue to provide one-stop online shopping for enterprise reports** through the Data Management Committee. Provide quick access to enterprise reports, including links to current reports and definitions and a schedule of future deliverables:  
[www.washington.edu/provost/oim/dmc/reports.html](http://www.washington.edu/provost/oim/dmc/reports.html)

**For more information** about Top 5, Enterprise Reporting, and more, see the Data Management Committee (DMC) Web site:

[www.washington.edu/provost/oim/dmc/](http://www.washington.edu/provost/oim/dmc/)

## CHANGES UNDERWAY

### Why is the Name of “Top 5” Changing to “Enterprise Reporting”?

The project’s name is changing to Enterprise Reporting to reflect a broader scope. The initial phase of the Top 5 project focused on answering five key data questions.

- The scope is now expanding to include other enterprise reporting projects such as research data, and planning and budgeting’s Unit Resource Profile (URP) report. This expanded scope will ensure a consistent and cohesive approach across all enterprise reporting efforts.
- Groups involved include the Office of Information Management (OIM), Registrar’s Office, Human Resources, Finance and Facilities, Office of Research Information Services, the Office of Planning and Budgeting, and schools and colleges.

### Why Has the Academic Advisory Group for Enterprise Reporting Been Formed?

This new advisory group has been formed to ensure that the needs of academic units are incorporated into the enterprise reporting effort. This group will report to the Data Management Committee and provide input into enterprise reporting projects. It replaces an advisory group of deans that provided advice on the initial Top 5 project.

- The group includes Deans’ and Chancellors’ key administrators and analysts from the College of Arts and Sciences, Evans School, UW Bothell, Information School, School of Nursing, and UW Tacoma.

- Other schools, colleges, and campuses are being asked to appoint liaisons to the advisory group to ensure their input is included. The project will communicate regularly with the liaisons, keep them updated on project progress, and seek their input on major decisions and directions.

### What is the Role of the Academic Advisory Group for Enterprise Reporting?

The new advisory group will provide two-to-four hours of service per month attending meetings, reviewing issues, validating reports, and communicating status. Specifically, the group members will:

- Solicit input from their deans or chancellors.
- Represent the academic community by providing direction on the development and delivery of analytics and reports that answer key data questions.
- Help set priorities for the work of the enterprise reporting projects, including which data questions to answer first, and the development and review of new enterprise reports.
- Ensure that input from academic units is incorporated into enterprise reporting work.
- Help identify and resolve issues related to the development of the enterprise reports including establishing institutional data definitions and business rules.
- Provide broad knowledge and expertise across a wide range of business domains.
- Communicate with the Board of Deans and Chancellors (BoDC), their individual deans or chancellors, and academic administrators across the University, keeping them informed of progress and issues. Help communicate and demonstrate enterprise reports at administrator forums and other events.

The Office of Information Management is coordinating and supporting the Enterprise Reporting project and providing staff support to the advisory group.